

Acumen: Supporting Self-Direction and the LA Community Choices Waiver

**Presented by
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Core of Self Direction

- Declaration of Human Rights
- Who can name one?
- Examples include:
 - ☐ FREELY participate in the cultural life of the community
 - ☐ Right to an education
 - ☐ The right to a standard of living adequate for the health and well-being of himself
- How many human rights?
 - ☐ 30



Core of Self Direction

■ Human Right #30

- Nothing in this Declaration may be interpreted as implying for any State, group or person any right to engage in any activity or to perform any act aimed at the destruction of any of the rights and freedoms set forth herein.

■ No One Can Take Away Your Human Rights



What was Changing?

Opinions
Ways of Thinking
Ideas
Views
Beliefs
Attitudes
Thoughts



Four Principles Of Self-Direction

- Everyone should have the Freedom to plan a life with support
- Everyone should have the Authority to control support dollars
- Everyone should have Support to be involved in the community
- Everyone should have Responsibility for the use of public funds



What was going in Society?

■ Deinstitutionalization

- 28 States wrote Medicaid **Waivers** to eliminate state Institutions

■ Medicaid Audits

- Are services being provided to ALL people who qualify



Catalyst for Change

- Robert Wood Johnson
 - Introduced a new option of funding supports through grants
- The New Option allowed the person with developmental disabilities, or their family, to hire their own support staff and to pay their staff through a fiscal employer agent



How does Acumen play a role in Self-Direction?

- Acumen is a Fiscal Agent
 - Take on the fiscal pieces (taxes and payroll)

- What is a Fiscal Agent?
 - Legitimate employer representative
 - Liable for correct calculation and payment of payroll withholdings and employer-related taxes
 - Liable for fiscal accountability to the employer and other stakeholders such as the state of Louisiana



How does Acumen play a role in Self-Direction?

- Why did Acumen get involved?
 - There was a need that few companies could meet or want to meet
 - People living in rural areas who couldn't get services
 - Favor

- Fiscal Agent for 15 years



Self-Direction Fun Facts

- Intention is NOT to compete with provider agencies
- Not for everyone
- The employer is given the option to be empowered with taking on the responsibilities that come with Self-Direction



Self-Direction Team

Employer/Participant

Acumen Fiscal Agent

State/Support Coordinator



Employer Responsibilities

- Typically have no functional relationship with the IRS because Acumen will represent them in all aspects
- Follow relevant laws and rules on employment
- Liable for DOL compliance, OSHA requirements, job-related injury, mistreatment, abuse, discrimination, harassment, etcetera of their employees - like any other employer.



Employer Responsibilities

- Act as the Supervising Employer
 - Recruit, hire, train, and schedule employees
 - Fire employees when necessary
 - Create job descriptions and expectations
 - Oversee employees
 - Determine wages
 - Provide a safe work environment
- Keep important records on each employee and keep them confidential



Employer Responsibilities

- Correctly complete and submit paperwork to enroll themselves and employees
- Ensure timesheets are completed correctly including signatures
- Submit time to Acumen
- Manage the Prior Authorization amounts
 - ☐ Responsible for staying within the budget
 - ☐ Review account statements from Acumen and ensure they are accurate
 - ☐ Manage the budget and plan for the entire prior authorization period
- Ensure services are being received



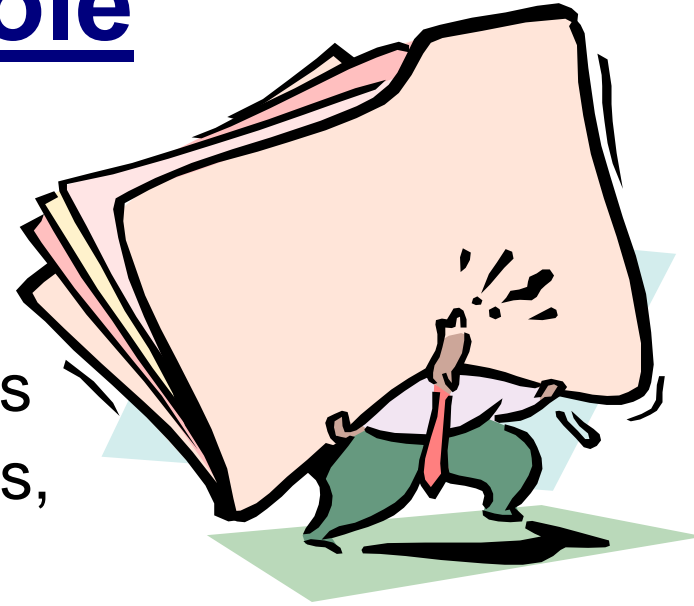
Support Coordinator

- Determine services and develops plan of care
- Assess appropriateness for self-directed services
- Assist employers with employer responsibilities
- Assist in creating and ensure emergency back up plan is well thought out
- Notify Acumen if participant goes in/out of hospital (148)
- Monitor and follow up on services received
- Assist with services outside self directed services
- Conduct reassessments based on needs
- Expertise is utilized to help navigate the system



Acumen's Role

- Process enrollment paperwork, monitoring for correctness and completeness
- Conduct criminal background checks
- Track certifications and qualifications, if needed
- Process payroll according to prior authorization
- Withhold, report and pay all employment taxes
- Arrange for workers' comp and other benefits
- Provide reports to employer and state about prior authorization usage
- Answer questions about enrollment and payroll



Acumen's Role



Ensure compliance

Enforce the rules



Police the processes



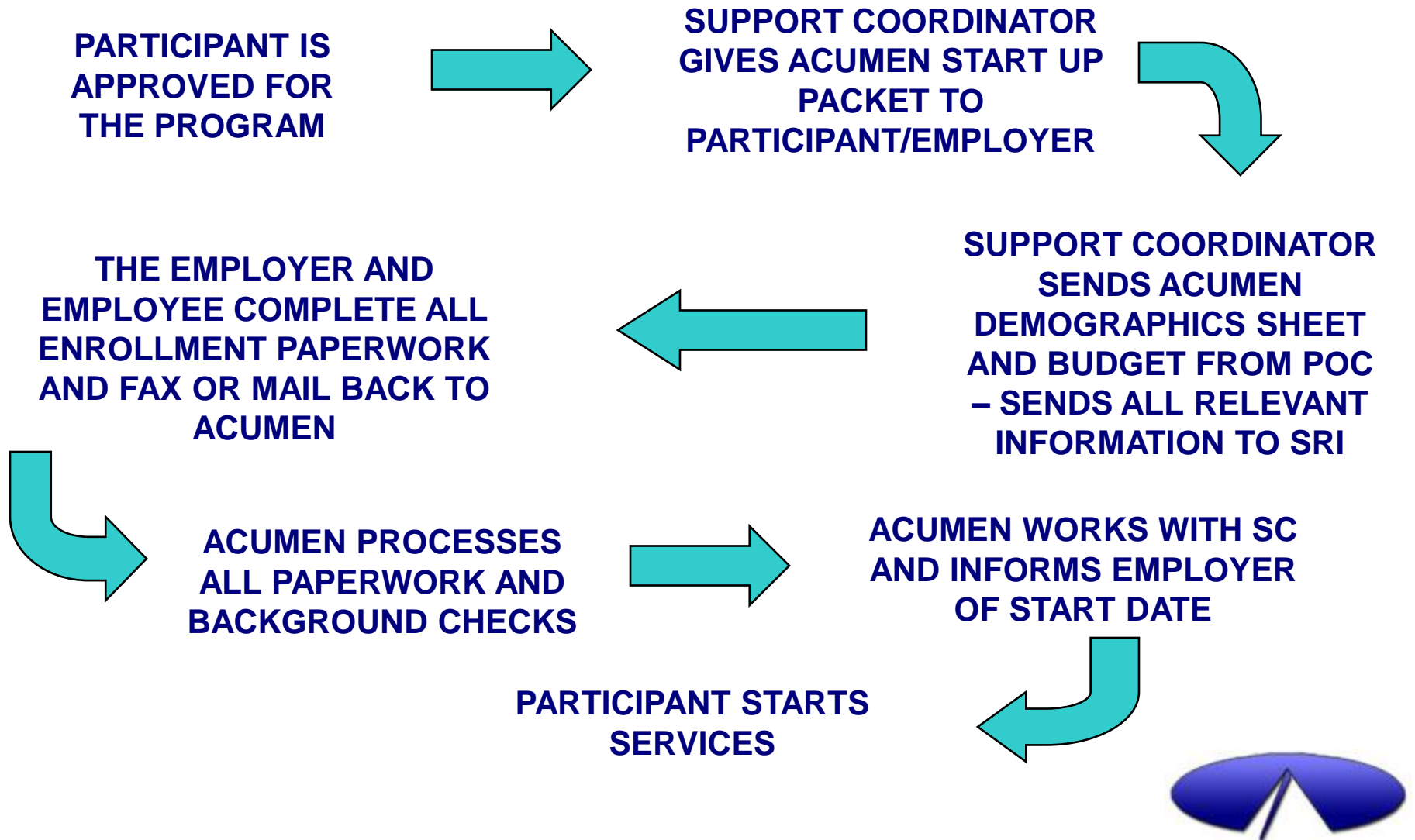
What is Not Acumen's Role

- Determine eligibility or ineligibility for the program
- Determine if someone is right for self directed services
- Determine what services or the amount of money or units a participant qualifies for
- Hire, fire, train or schedule employees
- Emergency back up

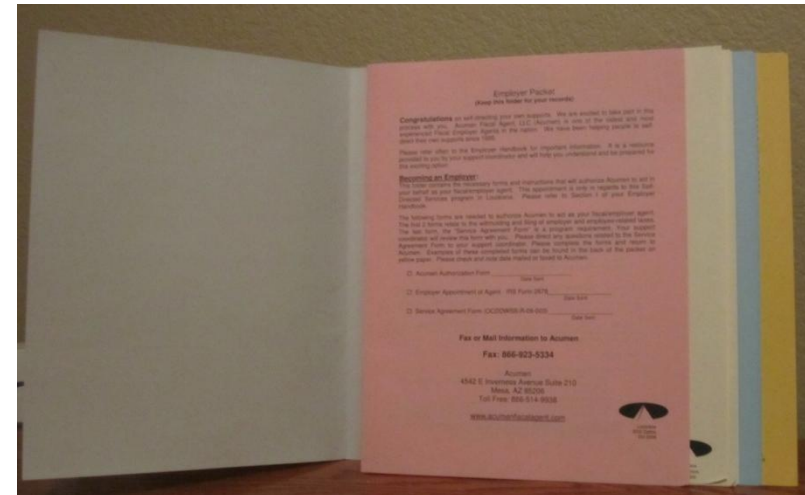
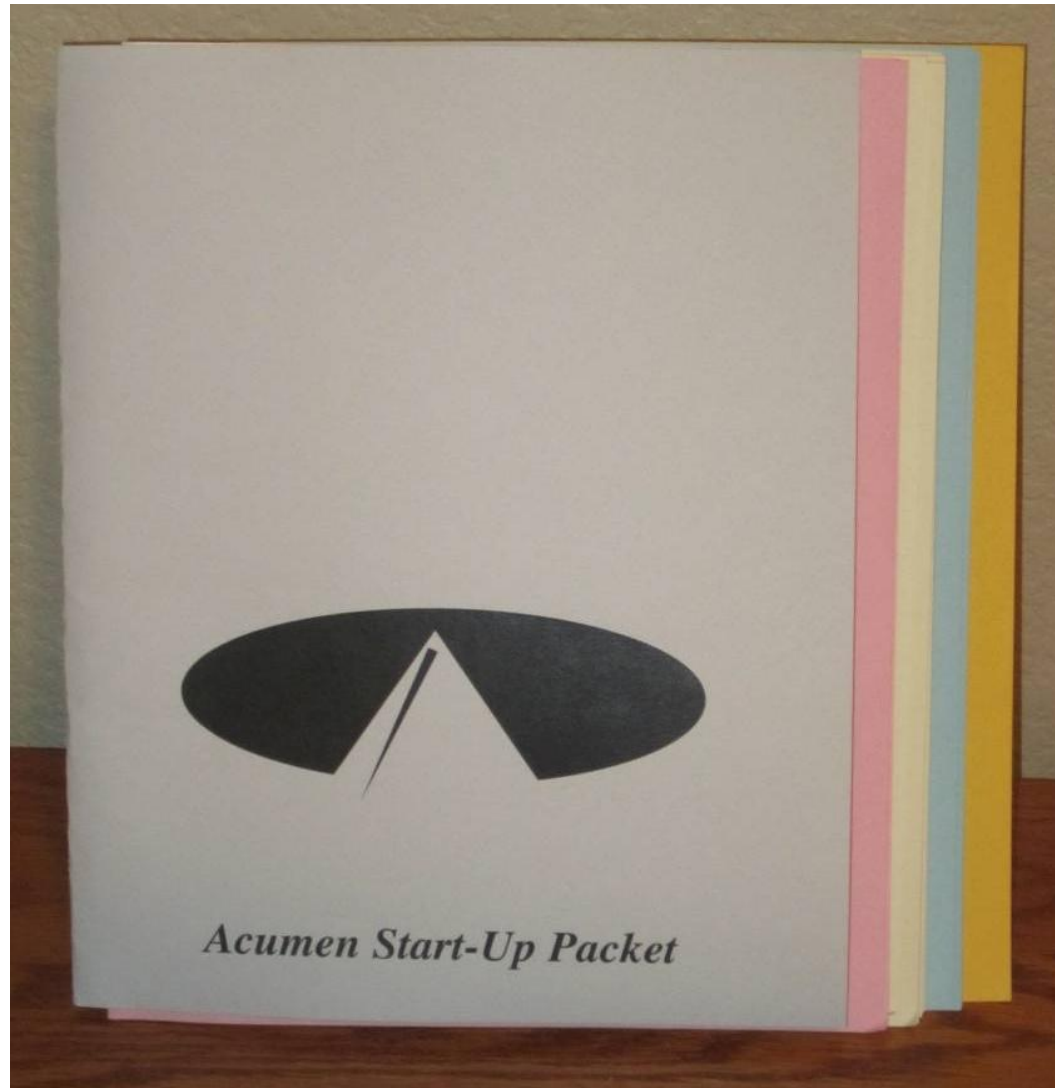


HIGH LEVEL - GENERAL PROCESS OVERVIEW

Self Directed Programs

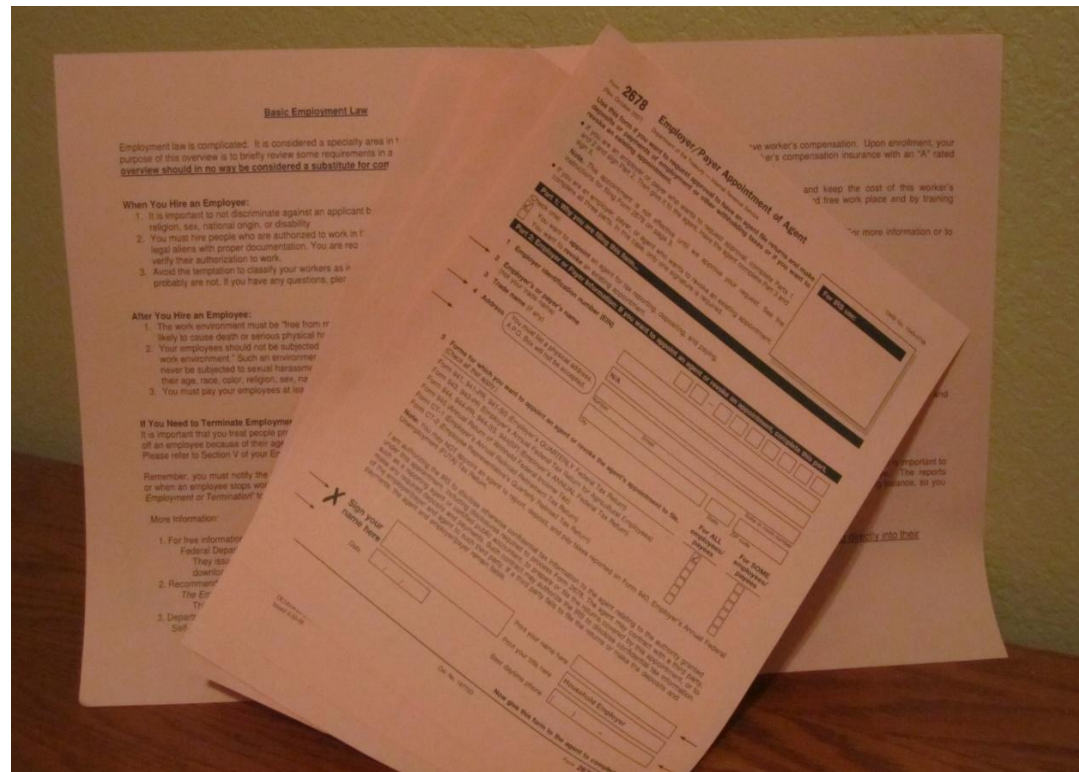


Enrollment Packet



Enrollment Packet Employer/Participant

- Acumen Authorization
- Form 2678
- SS-4 Form
- Form 8821
- Service Agreement
Form - Employer
Agreement
- Roles and
Responsibilities



Enrollment Packet Employee (Cream)

- Applicant Verification Form
- I-9 – Employment Eligibility
- W-4 – Federal Tax Withholding
- L-4 – State Tax Withholding
- Pay Selection/Direct Deposit
- Application for Employment
- Provider Agreement Form
- Background Check Authorization
- Proof of Auto Insurance or Waiver
- Employee Change/Term Form



Enrollment Packet

Paying for Your Supports (Blue)

- Payment Schedule
- Timesheet
- Timesheet Instructions
- Show me the Money

MONTH	Payroll Period Start Date	Payroll Period End Date	Timecards Due NO Later Than	PAYDATE	PAYDAY
JULY	07/01/2011	07/15/2011	07/21/2011	07/29/2011	Friday
	07/16/2011	07/31/2011	08/04/2011	08/15/2011	Monday
AUGUST	08/01/2011	08/15/2011	08/19/2011	08/30/2011	Tuesday
	08/16/2011	08/31/2011	09/07/2011	09/15/2011	Thursday
SEPTEMBER	09/01/2011	09/15/2011	09/21/2011	09/30/2011	Friday
	09/16/2011	09/30/2011	10/06/2011	10/14/2011	Friday
OCTOBER	10/01/2011	10/15/2011	10/20/2011	10/31/2011	Monday
	10/16/2011	10/31/2011	11/04/2011	11/15/2011	Tuesday
NOVEMBER	11/01/2011	11/15/2011	11/21/2011	11/30/2011	Wednesday
	11/16/2011	11/30/2011	12/06/2011	12/15/2011	Thursday



Federal Unemployment (FUTA). State law governs State Unemployment (SUTA) and Workers' Compensation. The amount you pay for each of these is a percentage of payroll, and are as follows:

Social Security	- 6.20%
Medicare	- 1.45%
Federal Unemployment	- .80%
State Unemployment	- 2.38%
Worker's Compensation	- 4.07%

What this means is that for every \$1.00 you pay in wages, you have to additionally pay approximately 15¢ in taxes and Worker's Compensation. **You do not need to worry about the calculations or actually paying these amounts, that is Acumen's job. We do it all on your behalf.**

The following table is provided so you will know your cost to employ someone, based on various wage amounts. The "Cost to You" column is simply the wage multiplied by the total of the percentages listed above. You are free to pay your employees other amounts up to the maximums listed per service; just multiply the amount you want to pay by 1.149, and you will get the Cost to You, or give us a call, we will help you know your costs. Remember that you must work with your support coordinator to revise your Plan of Care to change your employee's wage.

Employee Wage	Cost to You	Unit Rate		Employee Wage	Cost to You	
\$ 5.50	\$6.32	\$1.58		\$ 12.00	\$13.79	
\$ 6.00	\$6.89	\$1.72		\$ 13.00	\$14.94	
\$ 7.00	\$8.04	\$2.01		\$ 14.00	\$16.09	
\$ 7.03	\$8.08	\$2.02	Max Pay Rate PA3	\$ 15.00	\$17.24	
\$ 7.25	\$8.33	\$2.08	Minimum Wage	\$ 16.00	\$18.38	
\$ 7.50	\$8.62	\$2.15		\$ 17.00	\$19.53	
\$ 8.00	\$9.19	\$2.08		\$ 18.00	\$20.68	
\$ 8.04	\$9.24	\$2.15	Max Pay Rate PA2	\$ 20.00	\$22.98	
\$ 8.50	\$9.77	\$2.44		\$ 21.00	\$ 24.13	
\$ 9.00	\$10.34	\$2.59		\$ 23.00	\$ 26.43	
\$ 9.50	\$10.92	\$2.73		\$ 25.00	\$ 28.73	
\$ 9.85	\$11.32	\$2.83	Max Pay Rate PAS	\$ 26.11	\$ 30.00	Max Pay Rate PAM/PPM

PAS - Personal Assistance Services, Adult

PA2 - Personal Assistance Services, Adult - shared by 2 Participants

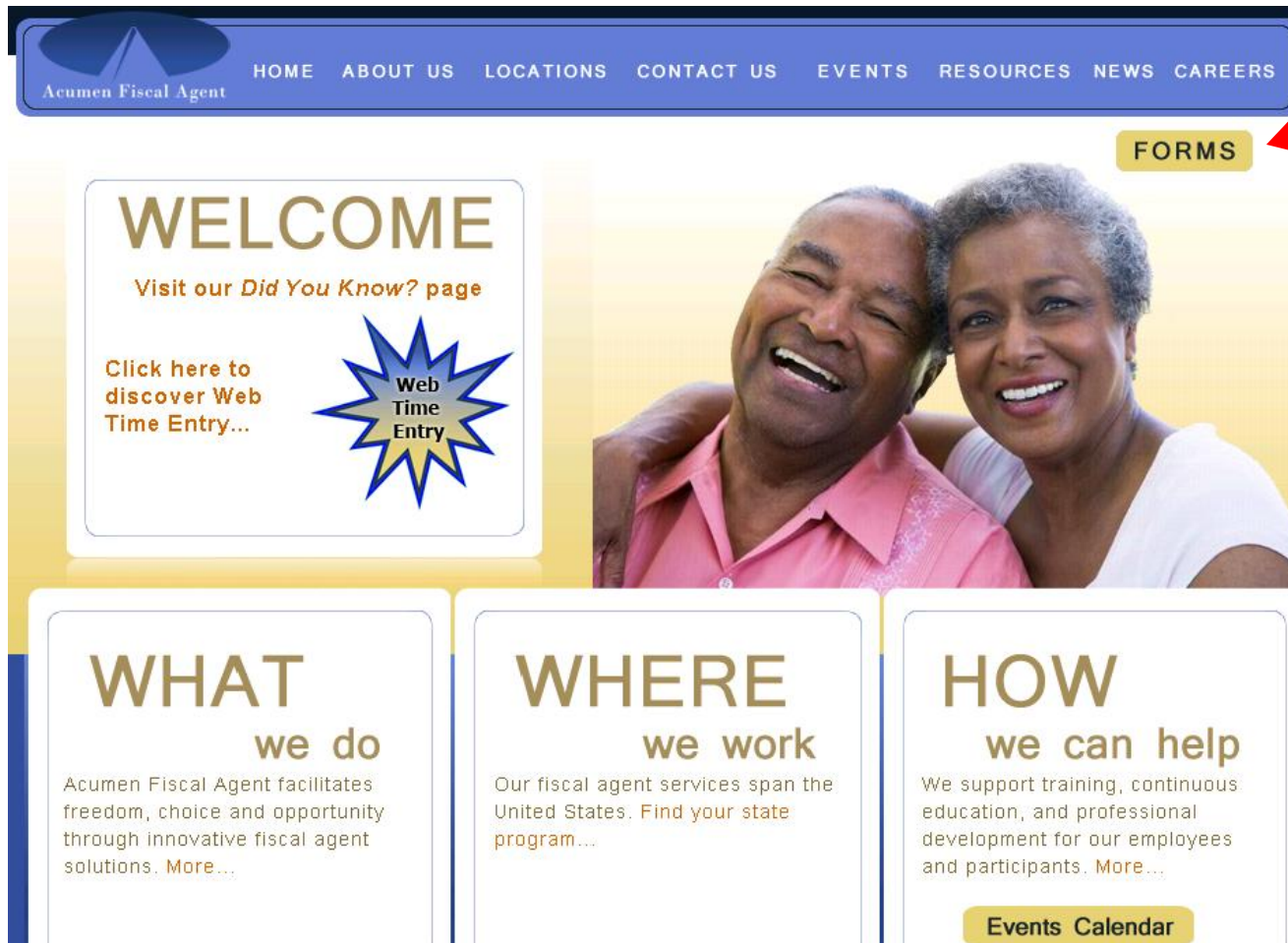
PA3 - Personal Assistance Services, Adult - shared by 3 Participants

PAM – Personal Assistance Service, Adult - service provided in the morning (am)

PPM – Personal Assistance Service, Adult - service provided in the evening (pm)



Forms on our Website!



www.acumenfiscalagent.com



How to read your new Account Statement

ACUMEN FISCAL AGENT Account Statement

Activity 5/16/2011 to 05/31/2011

Prepared For
CLIENT, SAMPLE
LA CCW

SAMPLE EMPLOYER
P O BOX 12345
ANYTOWN, LA 46000

Account Information

Account	Total Deposits	Period Spending	Total Spending	Balance
PAS 09-01-11 - 1-31-12	565.00	24.00	525.50	39.50

Employee Information

Last Name	First Name	Pay Type	Status	Employee #	First Aid Expire	Hire Date	CPR Expire
EMPLOYEE 1	SAMPLE	Check	Active	LA1234		09/24/2009	
EMPLOYEE 2	SAMPLE	Direct Deposit	Active	LA2345		10/18/2009	

Payroll Summary YTD

Last Name	First Name	Gross	FICA	Medicare	FUTA	SUTA	Comp
EMPLOYEE 1	SAMPLE	\$210.00	\$13.02	\$3.05	\$1.68	\$5.67	\$4.87
EMPLOYEE 2	SAMPLE	\$167.50	\$10.39	\$2.43	\$1.34	\$4.52	\$3.88
		\$377.50	\$23.41	\$5.48	\$3.02	\$10.19	\$8.75



Code and Rate Information

Last Name	First Name	Code	Description	Start Date	End Date	Rate
EMPLOYEE 1	SAMPLE	PAS	Personal Attendant	09/24/2009	12/31/2020	\$8.50
EMPLOYEE 1	SAMPLE	PAS	Personal Attendant	09/24/2009	12/31/2020	\$8.50
EMPLOYEE 2	SAMPLE	PAS	Personal Attendant	10/18/2009	12/31/2020	\$8.50

Payroll Check Information

Check #: 00004352

Date: 5/20/2011

Payee: EMPLOYEE 2, SAMPLE

Net: \$188.39

Gross: \$204.00

Medicare: \$2.96

FICA: \$12.65

SUTA: \$4.86

FUTA: \$1.63

Work Comp: \$8.30

Batch #: 001344

Billing: \$234.40

Type: Direct Deposit

Code	Description	Date	Time In	Time Out	Rate	Hours
PAS	Personal Attendant	4/18/2011	10:00 AM	05:00PM	\$8.50	8.00
PAS	Personal Attendant	4/19/2011	10:00AM	05:00PM	\$8.50	8.00
PAS	Personal Attendant	4/28/2011	07:00AM	03:00PM	\$8.50	8.00
						24.00

Legend

Program Code	Internal Code	Description
S5125U1	PAS	Personal Attendant



Any Questions?





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